

1/28

One data record	
FIELD NAME	VALUE
Name	Stewart Little
Address	Cheesetown, NC 44455
Telephone	111-222-3333
Sales status	Suspect
Possible Values	
Lead	
Suspect	
Prospect	
Hot	
Customer	

PRIOR ART

FIG. 1

2/28

Name	Source of lead	Enjoys Sports	Enjoys Ballet	Smokes Cigars	Sales Cycle Status
Alice	Web	Yes	Yes	Yes	Suspect
Bobby	Call in	No	No	No	Lead
Joe	Direct Mail	Yes	No	No	Suspect
John	Web	No	Yes	Yes	Prospect
Mark	Direct Mail	No	No	Yes	Lead
Mary	Call in	Yes	No	Yes	Lead
Michael	Call in	No	Yes	No	Lead
Paul	Web	Yes	No	No	Lead
Peter	Web	No	Yes	Yes	Prospect
Raymond	Direct Mail	Yes	Yes	No	Hot Prospect
Rodney	Web	Yes	No	Yes	Lead
Samantha	Call in	Yes	No	No	Prospect
Sylvia	Call in	Yes	No	No	Suspect
Tracy	Web	No	Yes	No	Hot Prospect
Trent	Web	No	No	No	Suspect

PRIOR ART

FIG. 2

3/28

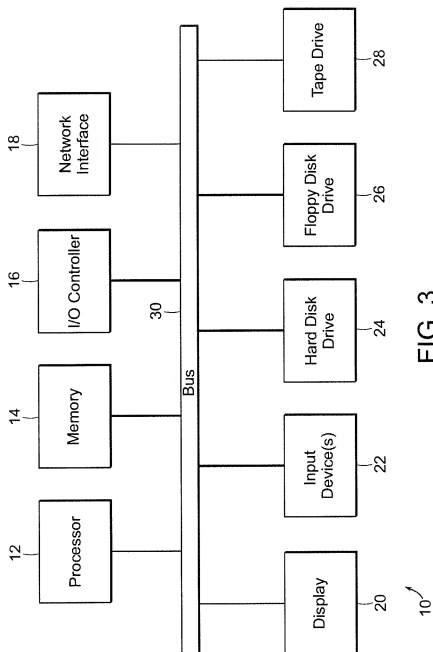


FIG. 3

4/28

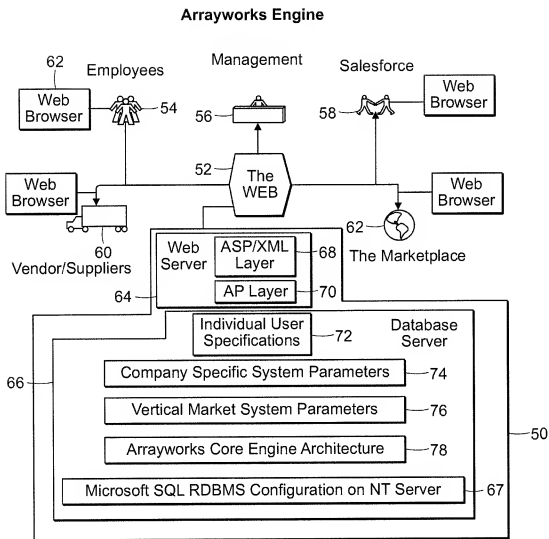


FIG. 4

5/28

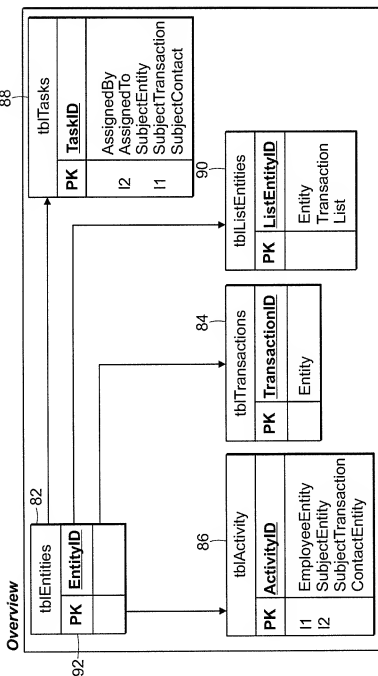


FIG. 5

80

6/28

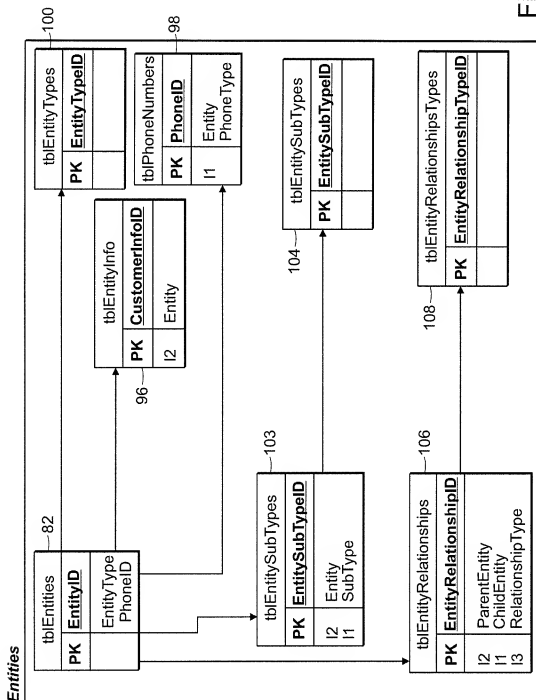


FIG. 6

7/28

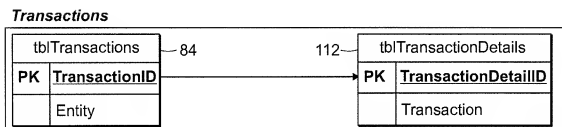


FIG. 7

8/28

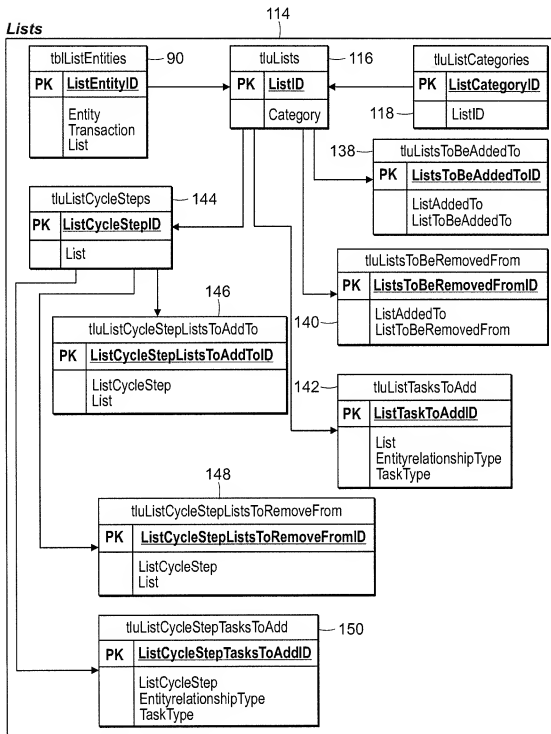


FIG. 8



9/28

122 ↙

TO THIS		128	130
Name	Lead		
Bobby	Bobby		
Trent	Paul		
Sylvia	Michael		
Samantha	Mark		
Joe	Mary		
Paul	Rodney		
Michael	<b>Suspect</b>		
Tracy	Trent		
Raymond	Sylvia		
Mark	Joe		
Mary	Alice		
Rodney	<b>Prospect</b>		
Peter	Samantha		
John	Peter		
Alice	John		
	<b>Hot</b>		
	Tracy		
	Raymond		

120 ↙

FROM THIS		126
Name	Sales Cycle Status	
Alice	Suspect	
Bobby	Lead	
Joe	Suspect	
John	Prospect	
Mark	Lead	
Mary	Lead	
Michael	Lead	
Paul	Lead	
Peter	Prospect	
Raymond	Hot Prospect	
Rodney	Lead	
Samantha	Prospect	
Sylvia	Suspect	
Tracy	Hot Prospect	
Trent	Suspect	

FIG. 9B

FIG. 9A

10/28

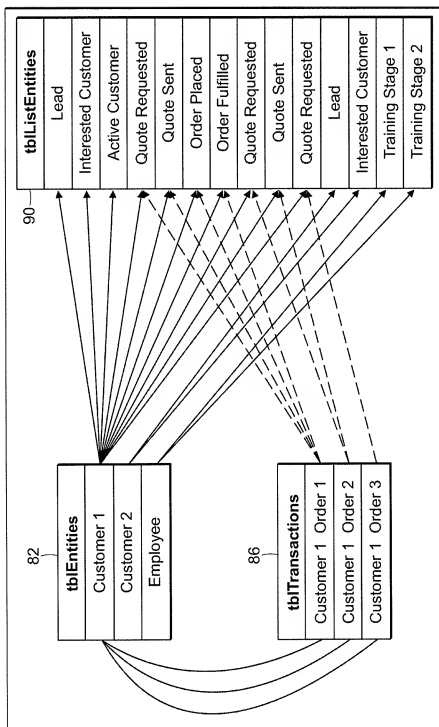


FIG. 10

11/28

Each List can, in turn, trigger other list additions, deletions or actions immediately or after a user-definable amount of time — creating a easily specifiable and virtually limitless eProcess chain reaction.

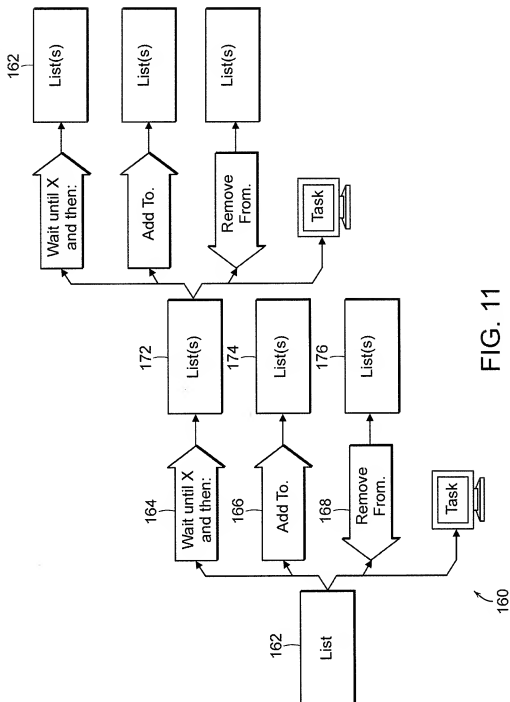


FIG. 11

12/28

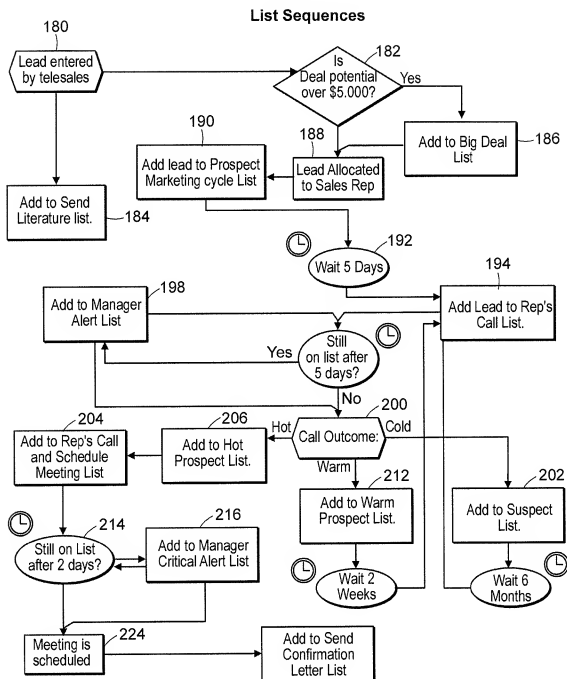


FIG. 12



14/28

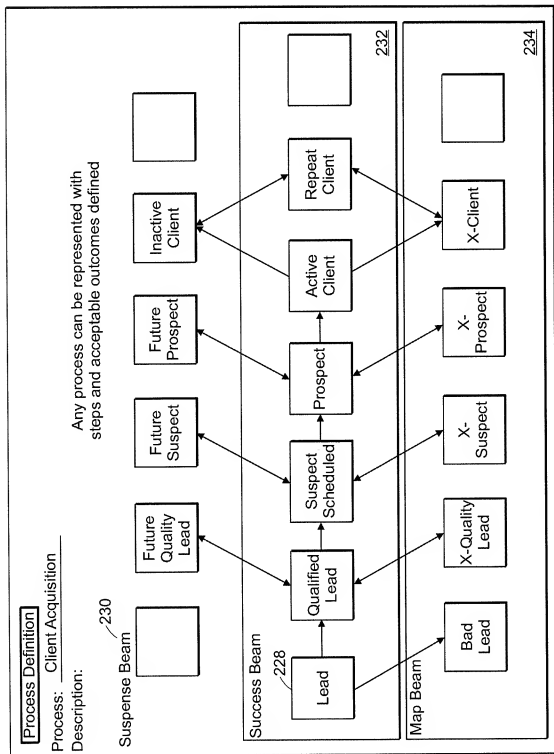


FIG. 14

15/28

Rules Definition		Behind each step is a List Rule Worksheet			
List: _____		Lead _____			
Remove from These Lists		Add to These Lists		Create these Tasks	
Qualified Lead	Suspect	Prospect	Get basic Information	Internal Memo to Staff	Qualify Lead
Active Client	All Suspense in Category	All Stop in Category			
Time-Based					
10 days			Lead over 10 days old		10 day Reminder to Qualify Lead
20 days			Lead over 20 days old		Consider marking as Future Lead

FIG. 15

16/28

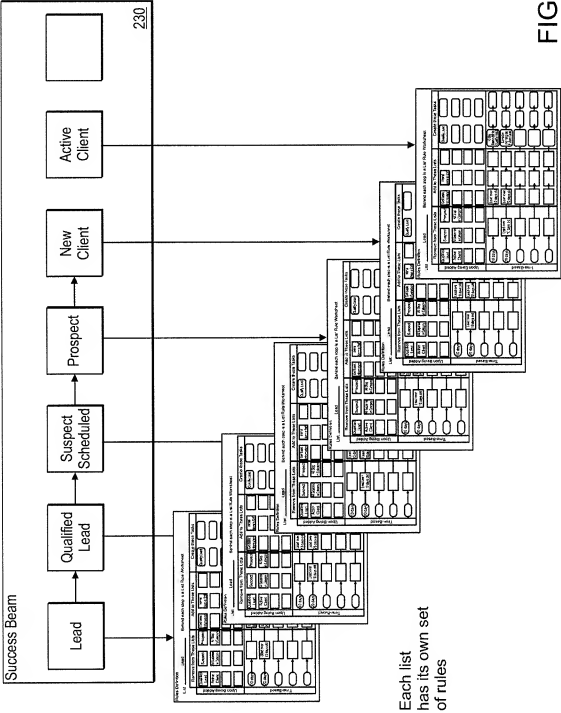


FIG. 16A



17/28

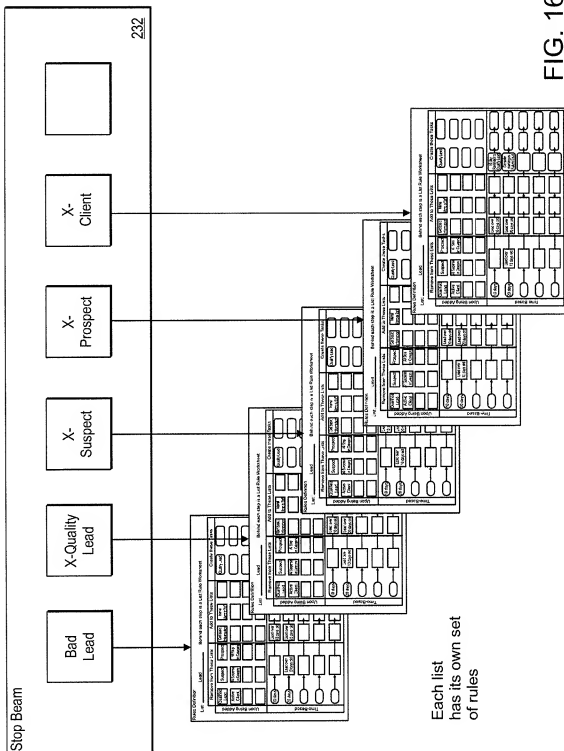


FIG. 16B

18/28

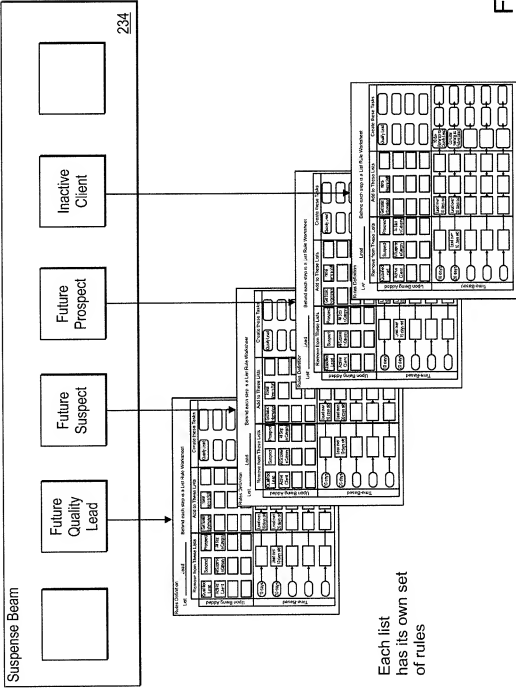


FIG. 16C

19/28

FIG. 17A

[illegible]



21/28

FIG. 17C

[illegible]

## 22/28



FIG. 18

23/28

[illegible]

FIG. 19A

24/28

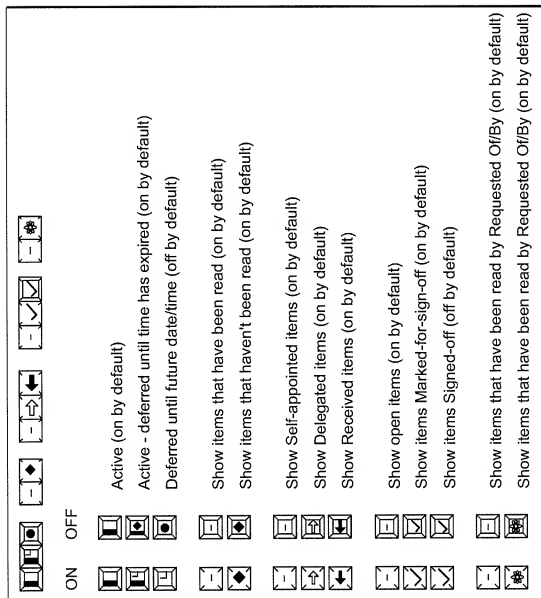


FIG. 19B



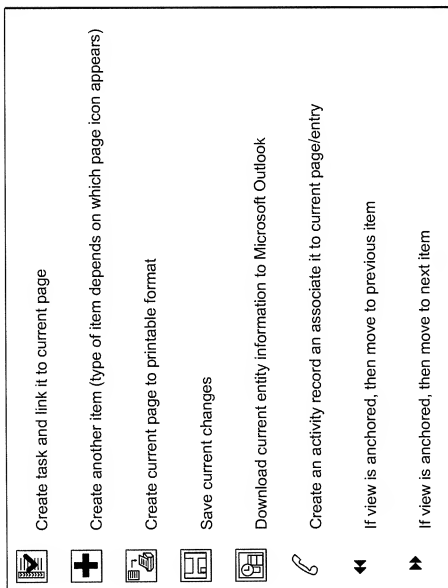


FIG. 19C

[illegible]

FIG. 20

27/28

**Assign To:** Plasecki, Richard By Quast, Karen  
**Priority:** 3 (Assigned To Priority - 3)  
**Description:** 25 - 100 people Date undetermined  
**Due Date:**  
 [Goto Page]

**Interested Parties**

**Comments and Actions**

Date	By	Comment
03/01/01 04:34 PM	Plasecki, Richard	The task was marked for sign-off on 3/1/2001 4:34:25 PM
03/01/01 04:34 PM	Plasecki, Richard	End of the month over, sales meeting on monday will cell
02/26/01 07:40 PM	Quast, Karen	The task was reactivated on 2/26/2001 7:40:11 PM
02/26/01 04:14 PM	Plasecki, Richard	The task was marked for sign-off on 2/26/2001 4:14:13 PM
02/26/01 04:14 PM	Plasecki, Richard	Site visit (?) with Pete Cronin Thurs PM
02/14/01 01:24 PM	Quast, Karen	Please give me status on this RJ wants to follow this mailing
02/14/01 01:24 PM	Quast, Karen	The task was reactivated on 2/14/2001 1:24:04 PM
02/14/01 01:00 PM	Plasecki, Richard	The task was marked for sign-off on 2/14/2001 1:00:25 PM
02/14/01 01:00 PM	Plasecki, Richard	Invited him in for a SV this week, Fri no confirmation yet
02/14/01 11:39 AM	Quast, Karen	Is site visit scheduled?
02/14/01 11:39 AM	Quast, Karen	The task was reactivated on 2/14/2001 11:39:12 AM
02/14/01 09:33 AM	Plasecki, Richard	May come in for a site visit 2-16
02/09/01 10:42 AM	Plasecki, Richard	The task was marked for sign-off on 2/9/2001 10:42:04 AM
02/09/01 10:42 AM	Plasecki, Richard	Greet Lead from mailer, will come in for site visit, incentive event in MAR
02/08/01 10:29 PM	Quast, Karen	The task was delegated

**Comment:**

**Subdelegated Tasks**

P	SOS	URR	URT	Subject	Related To	Assigned To	Due Date
---	-----	-----	-----	---------	------------	-------------	----------

FIG. 21

28/28

[a]<sup>x</sup>

*e-process enablement*

**TASKS**

**Subject:**

**Relates To:**

**Delegate To:**

**Priority:**

**Description:**

**Due Date:**

**Defer:** For  or until

**Private:** ☐

[Sign Off]

*Interested Parties*

*Comments and Actions*

Date	By	Comment
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid black; flex-grow: 1; min-height: 30px;"></div> <div style="border: 1px solid black; padding: 2px 5px;">Add Comment</div> </div>		

*Subdelegated Tasks*

P	SOS	URR	URT	Subject	Related To	Assigned To	Due Date

FIG. 22